U.S. Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Portal Rollout Strategy
Task Order Technical Proposal

Overview
SFA's Internet Channel has more than 35 websites connected to multiple back-end systems. The SFA websites do not provide for a unifying theme or a consistent, common "look and feel" across all sites. Students and Financial Partners do not have one, single entrance-point to access SFA's Internet services; they must access multiple URLs to retrieve financial aid information. SFA websites need a personalized starting point for Students and Financial Partners to enter through one "front door" to access a single view of internally and externally stored content/information, application/services, business processes, and knowledge assets for every Channel.

Business Problem:

- No single starting point for SFA customers.
- No single view of information that can be personalized for Students or Financial Partners.
- No integration across multiple websites and systems for internal and external use.
- No uniform, common "look and feel" for SFA website(s).
- No consistent standards and architecture.
- No common Customer Care component across all sites.

The purpose of the SFA Enterprise Portal with Student and Financial Partners Views initiative is to bring together, in one simple, personalized Web page all the information and productivity tools relevant to SFA's customers and Financial Partners to assist in making informed financial aid decisions and empowering Financial Partners to assist Students. The personalized "front door" will automatically identify and distribute content relevant to each user. The portals will integrate with existing SFA websites (e.g., FAFSA, NSLDS, DLSS, etc.), and external sites (Clearing House, Xap, Meteor, etc.), using the ITA infrastructure. The portal will be the glue that bonds all of SFA's web services together, providing a uniform starting point from which Students, Financial Partners and the Department of Education can access SFA.

Scope
The SFA Enterprise Portal will include:

- **Release 1 (April 15, 2002)**
  - Build an Enterprise Portal infrastructure to enable the integration of reengineered Modernization systems as well as new technology (e.g., wireless communication).
  - Build Students and Financial Partners views.
  - Build links to FFEL information from Students views.
  - Build a link to the Forms 2000 Financial Partners website.
  - Build a link to the Financial Partners Data Mart.
  - Build links to Trade Associations.

- Build a link to SFA University for Financial Partners conference registration.
- Build a link to FAFSA, Direct Loan Servicing, Loan Consolidation and NSLDS for Students views.
- Provide Students with links to .gov and .org neutral sites.
- Provide regulatory content information for Financial Partners.
- Determine the degree of personalization (9=most complex, 1=least complex).
- Analyze and define personalized data (both structured and unstructured) that will need to be accessible though the portal for Students and Financial Partners.
- Analyze the re-use of common portlet services.
- Build search capabilities, internally and externally for both Student and Financial Partner views.
- Build content management for both Student and Financial Partner views.
- Provide the ability to download the Security Access Form for Data Mart and FMS.
- Create common, uniform "look and feel" across the Enterprise Portal and sub-views.
- Perform usability testing to meet 508 compliance requirements.
- Build on the ITA infrastructure.
- Determine VDC hardware/software operation costs.
- Determine maintenance costs.
- Define on-going hosting strategy.

- **Release 2 (September 30, 2002)**
  - Provide message alerts for both Students and Financial Partners views.
  - Provide email alerts for both Students and Financial Partners views.
  - Provide a Personalized Interface that provides automatic identification and distribution of content relevant to Students and Financial Partners.
  - Provide a one-time sign-on for Students through the portal site using PIN authentication.
  - Provide detailed requirements gathering for additional external resources (Meteor, Clearing House, Xap, etc.).
  - Integrate with the Financial Partners Data Mart to provide self-audit capabilities.
  - Link to the Financial Partners Lender Payment Process.
  - Provide access to OPE data.
  - Provide on-line reports for top 5 Originators and Servicers data.
  - Integrate with Consistent Answers for single view of data for Students and Financial Partners.
  - Provide ability to fill out COHEA worksheet on-line for loan consolidation.
  - Creation of a Customer Adoption Plan for the SFA Students and Financial Partners portal.
  - Architecture for Single Sign-on capability.
  - Continue to build-out architecture to support reengineered SFA enterprise systems (e.g., NSLDS, DLCS, DLSS, DMCS) to move towards one, integrated single-view of Student FFEL and Direct Loan account information.

The scope will also include the following:

- eCRM capabilities – eServicing.

The scope of this task order will present SFA with the framework for building a unified portal for students, parents, and Financial Partners to access SFA Financial Aid information. Release 1 includes the design of the Enterprise Portal framework with Channel-specific views for Students and Financial Partners, the gathering of detailed requirements for both the Students and Financial Partners Channel-specific views. Release 1 will also include the development of the SFA Enterprise Portal with Channel-specific views for both Students and Financial Partners to be deployed upon successful testing and approval. It will also be flexible to address the changing business environment needs of SFA. The end result of this project will be a long-term business architecture strategy for the SFA Enterprise Portal. Release 2 will include enhanced student services and integration with the Financial Partners Data Mart self-audit capability and the Lender Payment process. This phase will also include the development of an adoption plan for Students and Financial Partners.

Deliverables

The deliverables under Release 1 will include the requirements definition, and the detailed design for the SFA Enterprise Portal and the Channel-specific views for Students and Financial Partners. The deliverables will also include the test plan, test scripts and the developed, tested and accepted solution including the source, object and execution code for the portal.

Release 1 Deliverables will include the following:

79.1.1 Project Schedule and Resource Assignments - Release 1– A project work plan with resource assignments will be created.

Desired Level of Performance - A project work plan outlining project tasks, milestones, completion dates, and resource assignments will be created and delivered to SFA.

Quality Level - A project plan with resource assignments for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and Financial Partners Channel's General Managers, respectively.

Delivery Date – 12/21/2002.

79.1.2 Requirements Definition - Release 1 – The requirements gathered for this deliverable will result in the portal design for use by the Students and Financial Partners Channels. A high-level evaluation of existing business processes and systems will be conducted to determine business needs. Additional considerations include, but are not limited to, the following:

- Ability to integrate with Portlet common services.
- Coordination with CIO's IT Management group (Integrated Technical Architecture) for standardized architecture for portals.
- Coordination with the Department of ED's overall portal strategy and how it fits with SFA – in conjunction with ED's CIO.
- Coordination with the Office of Communications for a standardized "look and feel" for all SFA portal and web activity.

Desired Level of Performance – The deliverable will consist of a draft requirements outline/format to be approved by SFA and the final Students and Financial Partners Portals Requirements document based on an analysis of respective business Channel requirements. It will include the following:

- Evaluation of the business problem through requirements gathering for customer needs across Students and Financial Partners Channels. A detailed analysis of these requirements will take place along with the analyses listed below to formulate the strategy.

Requirements gathering will take place according to the high-level outline below:

- Identification of key SFA business Channel contacts.
- Definition of SFA contact roles and responsibilities.
- Portal Day to solicit feedback and preliminary requirements.
- Meetings and interviews (core team with key SFA contacts).
- Meetings and interviews (SFA contacts with their organizations).
- Requirements package delivered to SFA contacts two business days prior to scheduled meetings.
- Requirements meeting minutes delivered one business day after meeting.
- Follow-up requirements meetings conducted, as necessary, to confirm minutes and/or discuss new questions or issues.

Quality Level – A document for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and the Financial Partners Channel's General Managers, respectively.

Delivery Date – 01/12/2002

79.1.3 Detailed Design Document - Release 1 – The requirements gathered for this deliverable will result in portals design for use by the Students and Financial Partners Channel.

Desired Level of Performance – The deliverable will consist of a Detailed Design that will be used to develop the Channel-specific portals format to be approved by SFA. It will include the following:

- Design of each Channel-specific portal based on requirements gathered, and guidance from, SFA.

Quality Level – A document for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and the Financial Partners Channel's General Managers, respectively.

Delivery Date – 2/11/2002

79.1.4 Test Plan and Test Scripts for Portal - Release 1 – SFA Enterprise Portal with Students and Financial Partners views.

Desired Level of Performance – This deliverable will consist of testing Release 1's SFA Enterprise Portal with Channel-specific views for Students and Financial Partners. The testing of portal products will happen in parallel for respective Students and Financial Partners Views. The Students Home Page view will be tested in the following views: Thinking, College, Attending College, Repaying College; and, will also have user-specific customization. The Financial Partners Home Page view to be tested includes the links to the Data Mart, Forms 2000, NSLDS, Trade Associations, SFA University and user-specific customization. After the SFA Enterprise Portal product has been developed, system testing for the Students Portal will take place with ACS and NCS. Usability and performance testing will follow system testing. The Enterprise Portal IPT (Integrated Product Team) will coordinate with members from the Operating subcontractor support teams to verify that the appropriate environment for product test is established, and integration is performed as schedule permits.

Quality Level – A document for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and the Financial Partners Channels General Managers, respectively.

Delivery Date – 3/11/2002

79.1.5 **Developed, Tested and Accepted Solution – Release 1** (including source, object and execution code**) –** Product development for the SFA Portal with views for both the Students and Financial Partners.

Desired Level of Performance – This Release 1 deliverable will consist of the development effort of the SFA Enterprise Portal with Channel-specific views for Students and Financial Partners. The development of the portal product will happen in parallel for respective Students and Financial Partners views. This task includes the development of the design created for each Channel-specific view. The Students view will have the following information: Thinking College, Attending College, Repaying College, and user-specific customization. The Financial Partners view will include the Home Page with links to the Data Mart, Forms 2000, NSLDS, Trade Associations, SFA University, and user-specific customization. Further customization may be needed and, if necessary, SFA must drive to make business processes fit within the product. The Enterprise Portal IPT will coordinate with members from the Operating subcontractor support teams to begin setting up the appropriate environment for product development per schedule.

Quality Level – A document for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and Financial Partners Channel's General Managers, respectively.

Delivery Date– 4/15/2002

Release 2 Deliverables will include the following:

Note: It is assumed that Release 2 deliverables will be modified upon completion of Deliverable 79.1.6. As a result of the modification, it is expected that Deliverable 79.1.7 will be separated into smaller components. There will be no cost impact from this modification.

79.1.6 Project Schedule and Resource Assignments Release 2 – A project work plan with resource assignments will be created.

> *Desired Level of Performance* - A project work plan outlining project tasks, milestones, completion dates, and resource assignments will be created and delivered to SFA.

> *Quality Level* - A project plan with resource assignments for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and the Financial Partners Channel's General Managers, respectively.

> *Delivery Date* – 05/17/2002.

79.1.7 Developed, Tested and Accepted Solution - Release 2 (including source, object and execution code**) –** Continued product development for the SFA Portal with views for both the Students and Financial Partners.

> *Desired Level of Performance* – The Release 2 deliverable will include enhancements to Release 1, message alerts for both Students and Financial Partners, email alerts, personalized interface that provides automatic identification and distribution of relevant content, a one-time sign-on for Students through the portal site using PIN authentication, integration with the Financial Partners Data Mart to provide self-audit capabilities, a link to the Financial Partners Lender Payment Process, access to OPE data, on-line reports for top 5 Originators and Servicers data, integration with Consistent Answers for a single view of data for Students and Financial Partners, the ability to fill out the COHEA worksheet on-line for loan consolidation, a Customer Adoption Plan for the SFA Students and Financial Partners portal, architecture for Single Sign-on capability, and a continuation of build-out architecture to support reengineered SFA Enterprise systems (e.g., NSLDS, DLCS, DLSS, DMCS) to move towards one, integrated single-view of Student FFEL and Direct Loan account information.   The Enterprise Portal IPT will coordinate with members from the Operating subcontractor support teams.

> *Quality Level* - A document for each specific Channel that meets the acceptance criteria defined below, delivered on time, with the approval of the Students and Financial Partners Channel's General Managers, respectively.

> *Delivery Date* – 09/30/2002.

Deliverables, Acceptance Criteria, and Milestones

Deliverable Number	Deliverable	Acceptance Criteria	Due
79.1.1	Project Schedule and Resource Assignments - Release 1	This deliverable will consist of a project work plan outlining project tasks. Milestones, completion dates, and resource assignments will be created and delivered to SFA.	12/21/01
79.1.2	Requirements Definition - Release 1	This deliverable will consist of the requirements gathered for both Students and Financial Partners, and will result in the portal design for use by the Students and Financial Partners Channels. A high-level evaluation of existing business processes and systems will be conducted to determine business needs.	1/12/02
79.1.3	Detailed Design Document - Release 1	This deliverable will consist of a Detailed Design Document resulting in a portal design for use by the Students and Financial Partners Channels.	2/11/02
79.1.4	Test Plan and Test Scripts for Portal - Release 1	This deliverable will consist of testing Release 1's SFA Enterprise Portal with Channel-specific views for Students and Financial Partners.	3/11/02
79.1.5	Developed, Tested and Accepted Solution – Release 1	This deliverable will consist of the development effort of the SFA Enterprise Portal with Channel-specific views as described in the deliverable description above.	4/15/02
79.1.6	Project Schedule and Resource Assignments - Release 2	This deliverable will consist of a project work plan outlining project tasks. Milestones, completion dates, and resource assignments will be created and delivered to SFA.	5/17/02
79.1.7	Developed, Tested and Accepted Solution – Release 2	This deliverable will consist of the development effort of the SFA Enterprise Portal with Channel-specific enhancements as identified in the deliverable description above.	9/30/02

Assumptions

1. Invoicing will be Firm Fixed Price based on the price of each deliverable. Deliverables will be invoiced upon acceptance and according to the Price Summary page in the enclosed Price Proposal.

2. SFA shall have 14 days from receipt of each deliverable to review and provide comments or questions to Accenture. If the deliverable substantially meets the acceptance criteria, then the deliverable shall be approved for payment. If the deliverable contains material errors or omissions, then Accenture shall have 7 days to correct and resubmit the deliverable, and SFA shall have an additional 7 days to review the revised deliverable. Accenture will promptly use commercially reasonable efforts to correct errors in each deliverable.

3. Close coordination between the CIO and Modernization Partner will be required. The deliverable dates are contingent upon the availability of the IPT teams and the SFA counterparts on an "as needed" basis to accomplish the objectives of this task order.

4. Requirements from business Channels are dependent on their participation. If they are unable to participate, their input will not be included in requirements at no impact to the Modernization Partner. The team will work with the SFA counterparts to coordinate participation with the teams listed in Deliverable 79.1.1 of this proposal.

5. The Modernization Partner anticipates utilization of subcontractor support from ACS to complete the requirements and testing of this effort.

6. The Enterprise Portal IPT will coordinate requirements with members from the Operating subcontractor support team (e.g., VDC or other site to be determined, etc.) to verify the appropriate environment set-up for product development, installation, test, and integration.

7. The Enterprise Portal IPT will coordinate with members from the Operating subcontractor support team (e.g., VDC or other site to be determined, etc.) to the extent possible so that we receive timely, concise, and accurate feedback from operators.

8. Release 2 deliverables will be modified upon completion of Deliverable 79.1.6. As a result of the modification, it is expected that Deliverable 79.1.7 will be separated into smaller components. There will be no cost impact from this modification.

9. Travel estimate is based on the GFY2002 Federal Travel Regulations. We have estimated the number of employees on full-time travel for an overall travel cost, divided the overall cost by the total number of hours to be worked, then distributed the travel estimate to each deliverable proportionally by number of hours per deliverable.

10. With regards to Section C.6, ACCOMMODATION/ACCESSIBILITY FOR THE DISABLED, of BPA ED-99-DO-0002, Accenture will perform all work related to FIP resources in accordance with a detailed requirements document developed in consultation with the Government and approved by the Government in advance. The requirements document will state the specific steps Accenture and the Government will take in further defining the general requirements of P.L. 99-506 Re-authorization of the Rehabilitation Act of 1973, Section 508 -Electronic Equipment Accessibility, October 1986; and P.L. 100-542 Telecommunications Accessibility Enhancement Act, October 1988. The incorporation of Section 508 requirements into deliverables originally developed by Accenture under this Contract will be effected in accordance with a detailed design developed in consultation with the Government and approved by the Government prior to implementation. Accenture will develop or use a set of tests to determine whether such deliverables are in substantial conformance to the detailed design. The Government will review and approve these tests prior to the commencement of the work. Upon successful completion of the agreed upon tests, Accenture's obligations under Section C.6, ACCOMMODATION/ACCESSIBILITY

FOR THE DISABLED, of BPA ED-99-DO-0002 will be deemed to have been fully satisfied. Unless otherwise mutually agreed to by Accenture and the Government, Accenture shall have the right to rely upon assurances of Section 508 compliance of equipment or software provided by third parties.

11. The complexity of this effort requires an additional Enterprise Level Associate Partner 1 resource (Ms. Nancy Krecklow). Ms. Krecklow's resume has been previously provided.